

**Best Available Copy**

---

April 27, 1999

**Interchange Functional  
Specification  
Version 2.4**

---














**PSW Business Confidential**

 **Warburg Dillon Read**



# Contents

<b>1. Introduction .....</b>	<b>1</b>
<b>2. Application Framework.....</b>	<b>2</b>
<b>3. Chat Window .....</b>	<b>3</b>
<b>3.1 Group Chat.....</b>	<b>5</b>
3.1.1 Group Chat User List .....	6
3.1.2 Group Chat Menu.....	6
3.1.3 Group Chat Toolbar .....	6
3.1.4 Group Chat Content Area .....	6
3.1.5 Group Chat Splitter Area.....	6
3.1.6 Group Chat Message Entry Area .....	7
<b>3.2 Private Chat.....</b>	<b>7</b>
3.2.1 Private Chat Menu .....	7
3.2.2 Private Chat Toolbar .....	7
3.2.3 Private Chat Content Area .....	7
3.2.4 Private Chat Splitter Area.....	7
3.2.5 Private Chat Message Entry Area.....	8
<b>3.3 Filtered Chat.....</b>	<b>8</b>
3.3.1 Filtered Chat Criteria List .....	8
3.3.2 Filtered Chat Custom Panel .....	8
3.3.3 Filtered Chat Menu.....	9
3.3.4 Filtered Chat Toolbar .....	9
3.3.5 Filtered Chat Content Area .....	9
3.3.6 Filtered Chat Splitter Area.....	9
3.3.7 Filtered Chat Message Entry Area .....	9
<b>4. Dock Window .....</b>	<b>10</b>
<b>4.1 Dock Tab.....</b>	<b>10</b>
<b>4.2 Dock Tab Navigation .....</b>	<b>11</b>
<b>4.3 Dock Menu .....</b>	<b>12</b>
<b>4.4 Dock Toolbar.....</b>	<b>12</b>
<b>4.5 Dock Content Area .....</b>	<b>12</b>
<b>4.6 Dock Splitter Area .....</b>	<b>12</b>
<b>4.7 Dock Message Entry Area .....</b>	<b>12</b>
<b>5. Channel Manager .....</b>	<b>13</b>
<b>5.1 Channel Manager Group Channel Tab .....</b>	<b>13</b>
<b>5.2 Channel Manager Private Channel Tab.....</b>	<b>14</b>
<b>5.3 Channel Manager Filtered Channel Tab.....</b>	<b>14</b>
<b>5.4 Channel Manager Users Tab .....</b>	<b>14</b>
<b>5.5 Channel Manager Channel Query Entry.....</b>	<b>14</b>
<b>5.6 Channel Manager Menus .....</b>	<b>14</b>
<b>5.7 Channel Manager Toolbar .....</b>	<b>15</b>

6.	Channel Creation .....	16
6.1	Creating a Filtered Channel .....	16
6.1.1	Select Channel Tab .....	17
6.1.2	Select User Tab .....	18
6.1.3	Select Content Tab .....	18
6.2	Creating a Group Channel .....	18
6.3	Creating a Private Channel .....	19
6.4	Creating a Multi-Post Channel .....	20
7.	Toolbar .....	21
7.1	Dock All Channels  .....	21
7.2	Show Channel Manager Window  .....	21
7.3	Whois  .....	21
7.4	Channel Preferences  .....	21
7.5	Print  .....	22
7.6	Find  .....	22
7.7	Post File  .....	22
7.8	Help  .....	22
7.9	Show/Hide User List  .....	22
7.10	Dock/Undock Window  .....	22
7.11	Private Chat/New Private  .....	23
7.12	New Group Chat  .....	23
7.13	New Filtered Chat  .....	23
8.	Preference .....	24
8.1	Colors .....	25
8.2	Fonts .....	25
8.3	Sounds .....	26
8.4	Window Default Behavior .....	26
9.	User Inspector .....	28
9.1	User Inspector New Entry .....	28
9.2	User Inspector Results .....	28
10.	Menu .....	29
10.1	Channel Menu .....	29
10.2	Edit Menu .....	31
10.3	User Menu .....	32
10.4	Window Menu .....	32
10.5	Help Menu .....	34
	Appendix A—Interchange Quick Reference .....	35
	Appendix B—Update History .....	36

## **1. Introduction**

---

Interchange (IC) is a conferencing tool that helps business users communicate more effectively on the Internet Relay Chat (IRC) network. IC provides a method for Warburg Dillon Read (WDR) personnel and their external clients to collaborate through features like content filtering, secure file transfer, and hot links for web addresses (Universal Resource Locators or URLs) and chat channels.

IC has quickly become integrated into the workday for WDR personnel and its use is still growing. Its fast, easy-to-use interface is designed to help the users quickly become proficient in chatting with others on the IRC network.

## **2. Application Framework**

---

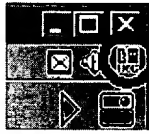
The Interchange application consists of a collection of windows with graphical toolbars and menus. The graphical elements of IC include the following:

- Chat window
- Dock window
- Channel manager
- Channel creation
- Toolbar
- Preference
- User inspector
- Menu

Each of these elements is discussed in a separate section of this functional specification.

### 3. Chat Window

The IC application has three types of chat windows, each with its own identifying icon. The identifying icon for the chat type is located in the upper right section of the window as shown in the figure below:



Next to the chat type icon are two controls, shown in the figure below:



The controls are used to control how the window reacts to certain events, specifically:

- **Window Controls**—Controls how the window reacts when new messages are received.
- **Sound Controls**—Controls the circumstances under which sounds are played.

The user toggles the action of the controls by clicking repeatedly on the button.

The main area of the chat window is the channel content area, where the messages from other users are displayed. The channel content area displays other types of information as well, including:

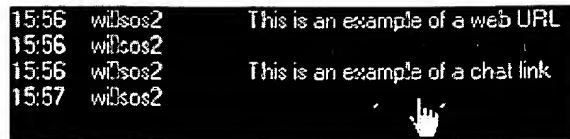
- **Date/Time Separator**—When a user first opens a channel, a group of messages may scroll through the channel content area. This occurs if a backchat bot is present on the channel. A backchat bot tracks the historical chat for a channel and displays the last 30 messages. Any messages from a previous day will be preceded by a date separator. The date is from the user's system. A date separator also appears when Interchange runs for multiple days and a new message comes in from a new day.



- **HTML and Chat Hotlinks**—When a message is sent that includes a web address in the form of <http://some-web-site>, that web address is displayed as a hypertext link. When clicked on, the link automatically opens the user's default web browser and the page specified by the hyperlink. Chat hotlinks are similar, except that the chat channel name has the standard # (pound) sign in front of it and appears in the form of #channel-name. When

a user selects the hyperlink for a chat channel, the channel is opened automatically in Interchange.

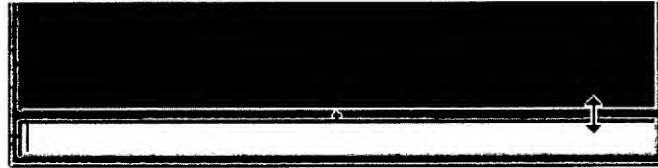
```
15:56 wilDso2 This is an example of a web URL
15:56 wilDso2
15:56 wilDso2 This is an example of a chat link
15:57 wilDso2
```



- **File Transfer**—When a user posts a file, such as a Microsoft Word document, to a channel, the posted file is displayed as a small document icon with a document name next to it. Clicking on the document icon or the file name opens the document with the application settings of the default web browser.

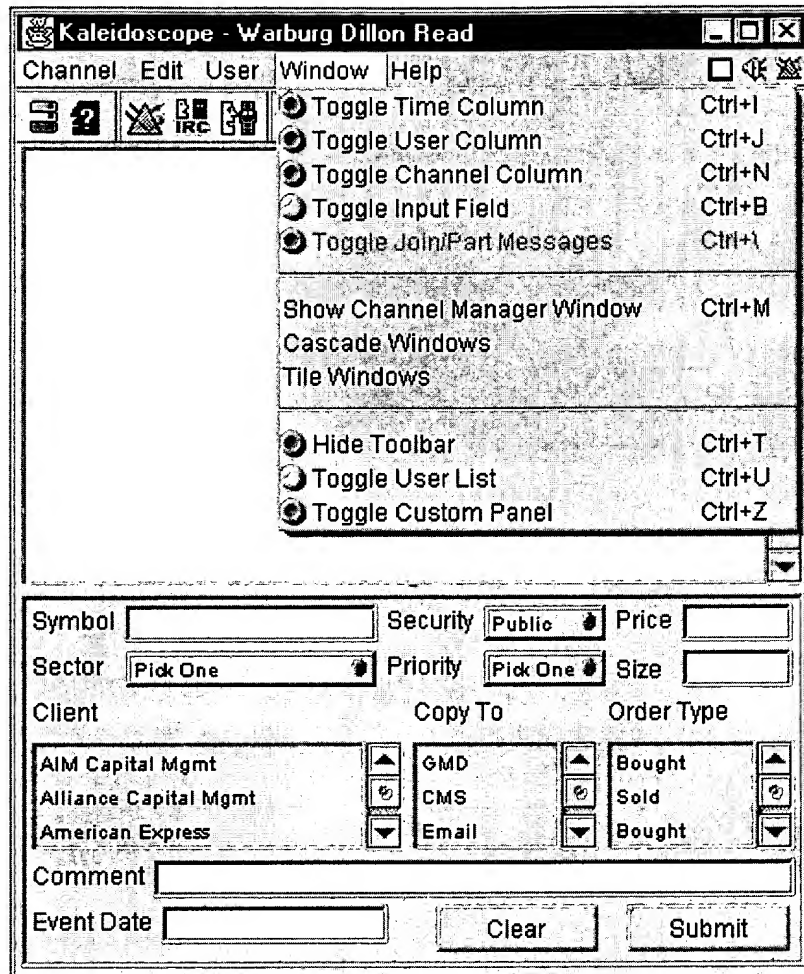


The channel content area and the message entry area are separated by the channel splitter bar. The channel splitter bar is used to resize the message entry area. The user does this by clicking on the bar and dragging vertically.



The message entry area is below the channel content area and the channel splitter bar. The user enters text messages into the message entry area, then, when finished, sends the message by pressing the Enter key on the keyboard.

Finally, a structured input panel is provided that can be used for several purposes: accessing the IC filter channel named Kaleidoscope, creating an order if size and prize are entered, or entering a comment. The user toggles the use of the panel with the Window menu item Toggle Custom Panel. The user may select inputs for the panel from the lists Security, Sector, or Priority. From lists, the user may also select Client, Copy To Destination and Order Type. The Clear button resets the input fields to blank. The Submit button sends the inputs to IC and Kaleidoscope simultaneously.

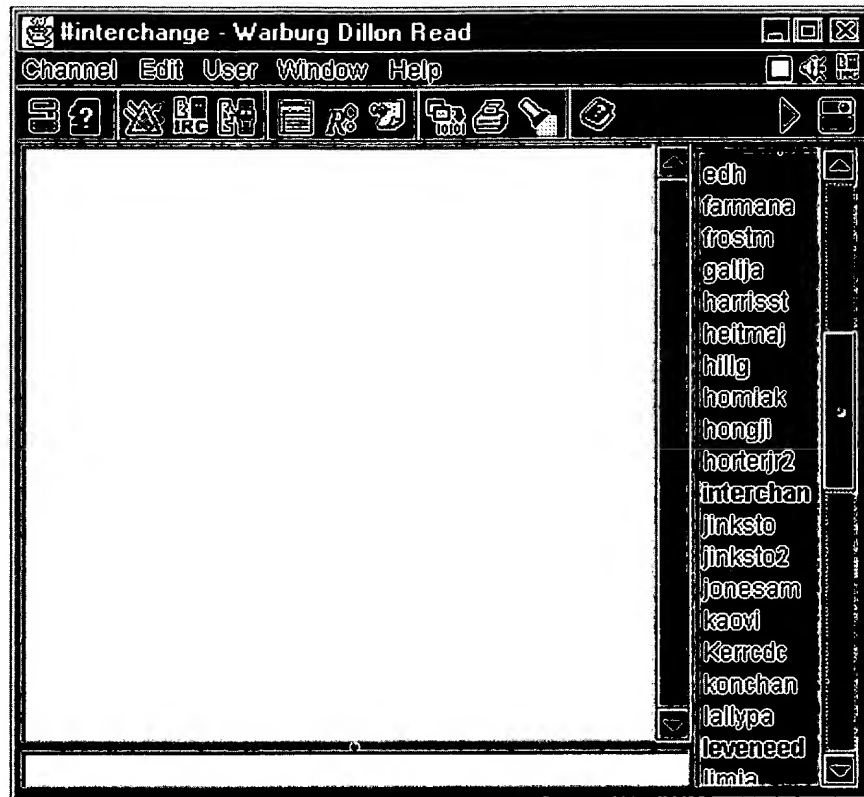


### 3.1 Group Chat

A group channel allows a group of people to chat, usually concerning a specified topic. There are two ways for a user to enter a group chat.

- From the Channel Manager window, enter the name of an existing group. Then press the Enter key on the keyboard or click the Open button on the screen.
- From the Channel Manager window, enter the name of a new group channel. Then press the Enter key on the keyboard or click the Create button on the screen. The Channel Creation window is displayed. Fill out the fields on the Channel Creation window, and then click the Create New Channel button.





### 3.1.1 Group Chat User List

On the right side of the Group Chat window is a list of users currently participating in the channel. User names in bold represent channel operators administering the channel. All others are normal users.

The user list can be hidden by clicking the Show/Hide User List button on the toolbar or by selecting the Toggle User List item from the Window menu. To open a private chat with a user in the user list, double-click on the user name.

### 3.1.2 Group Chat Menu

The menus that are visible on the Group Chat window have behavior similar to standard chat windows. See Section 10 for more information about the menus.

### 3.1.3 Group Chat Toolbar

The toolbar buttons that are visible on the Group Chat window have behavior similar to standard chat windows. See Section 7 for more information about the toolbar buttons.

### 3.1.4 Group Chat Content Area

The group chat content area behaves the same as other content areas in IC, as described earlier in Section 3.

### 3.1.5 Group Chat Splitter Area

The group chat splitter behaves the same as other splitters in IC, as described earlier in Section 3.

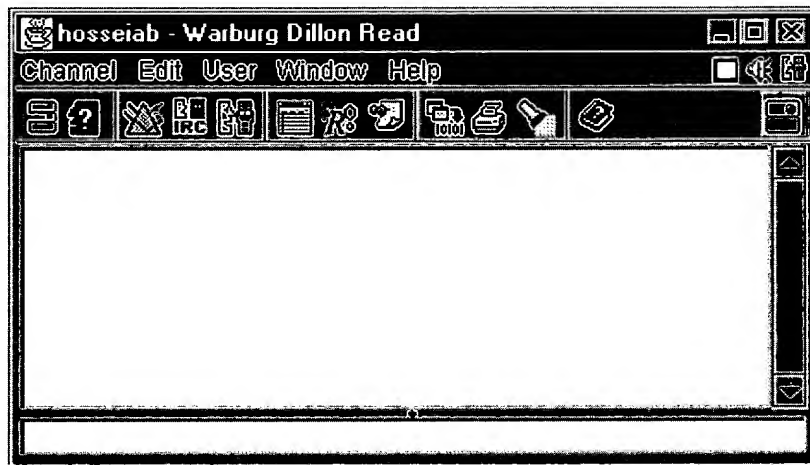
### 3.1.6 Group Chat Message Entry Area

The group chat message entry area behaves the same as other message entry areas in IC, as described earlier in Section 3.

## 3.2 Private Chat

A private channel allows two people to chat securely and privately with no one else able to see the content of the chat. There are several ways for a user to open a private chat.

- From the Channel Manager Users tab, double-click/right-click a user name.
- From the Channel Manager, click on the Private button on the toolbar.
- From the Group Chat user list, click the Private button.
- From the Group Chat user list, double-click/right-click a user name.



### 3.2.1 Private Chat Menu

The menus that are visible on the Private Chat window have behavior similar to standard chat windows. See Section 10 for more information about the menus.

### 3.2.2 Private Chat Toolbar

The toolbar buttons that are visible on the Private Chat window have behavior similar to standard chat windows. See Section 7 for more information about the toolbar buttons.

### 3.2.3 Private Chat Content Area

The private chat content area behaves the same as other content areas in IC, as described earlier in Section 3.

### 3.2.4 Private Chat Splitter Area

The private chat splitter behaves the same as other splitters in IC, as described earlier in Section 3.

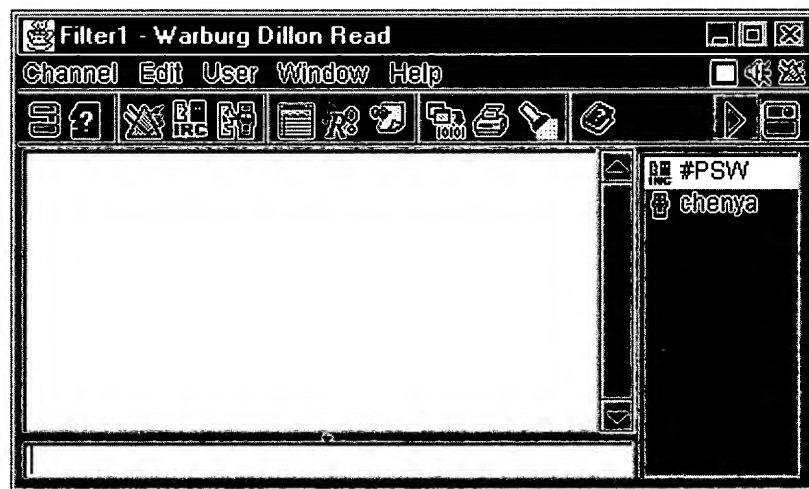
### 3.2.5 Private Chat Message Entry Area

The private chat message entry behaves the same as other message entry areas in IC, as described earlier in Section 3.

## 3.3 Filtered Chat

A filtered channel displays selected information from other channels. For example, a user can monitor channels to be alerted when a certain user speaks, or when a certain keyword is mentioned on a specific channel. Users create their own filtered channels using the Filtered Channel Creation window. There are several ways for a user to open or create a filtered channel.

- From the Channel Manager window, click the New Filtered Chat button on the toolbar.
- From the Channel menu of the Channel Manager window, select the New Channel→New Channel Filtered menu item.
- To open a filtered channel that has already been created, select the Channel Manager Filtered tab and double-click on the desired channel.



### 3.3.1 Filtered Chat Criteria List

The Filtered Chat window contains a list of criteria to use in making up the filtered channel, including channels and/or users on which to filter. Channel criteria that can be used to filter appear in bold when the user is on the channel. All other criteria are not available. Users in the user list are always available as filter criteria. The channel must be joined to activate the filter.

To hide the criteria list, click the Show/Hide User List button on the toolbar or choose the Toggle User List item on the Window menu. To open a private chat with a user in the criteria list, double-click on the user name.

### 3.3.2 Filtered Chat Custom Panel

A filtered channel named Kaleidoscope has additional input fields for creating orders and submitting comments. The Kaleidoscope channel can also be used to view information entered into Kaleidoscope and sent to other IC chats.

### **3.3.3 Filtered Chat Menu**

The menus that are visible on the Filtered Chat window have behavior similar to standard chats as described earlier in Section 3. See Section 10 for more information about the menus.

### **3.3.4 Filtered Chat Toolbar**

The toolbar buttons that are visible on the Filtered Chat window have behavior similar to standard chats as described earlier in Section 3. See Section 7 for more information about the toolbars.

### **3.3.5 Filtered Chat Content Area**

The filtered chat content area behaves the same as other content areas in IC, as described earlier in Section 3.

### **3.3.6 Filtered Chat Splitter Area**

The filtered chat splitter behaves the same as other splitters in IC, as described earlier in Section 3.

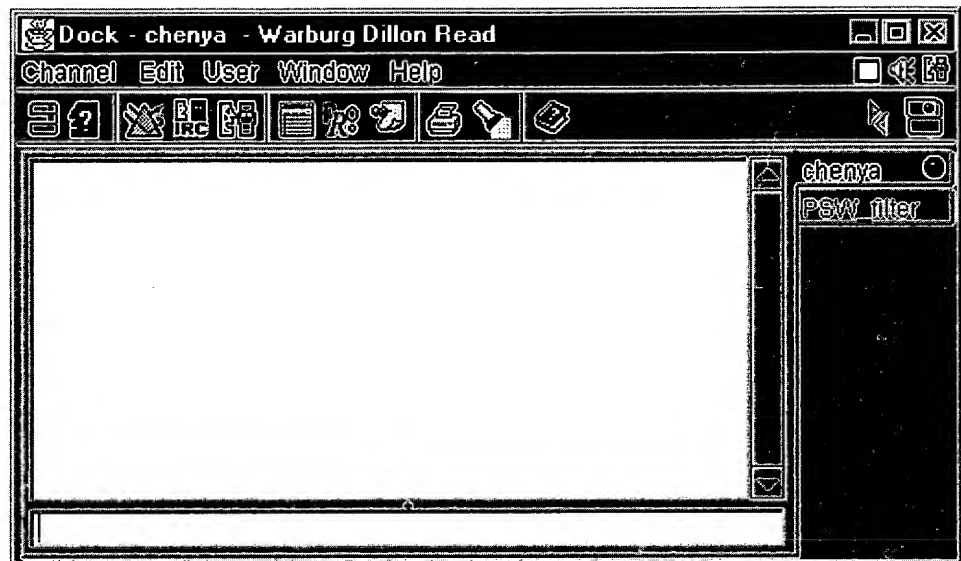
### **3.3.7 Filtered Chat Message Entry Area**

The filtered chat message entry is different from that of a group or private chat. When a user sends a message in a filtered channel, the message is sent to all of the channels and users in the filter criteria list. This function, called a multi-post, allows a user to send a single message to multiple destinations.

## 4. Dock Window




The Dock window is used to maximize user screen space by providing a central area to place channels that must always be visible. It is similar to minimizing a window, except that docking a window places it in a location where its activity can be easily monitored.





To place a window in the dock, click the Dock or Dock All button on the toolbar, or select Dock or Dock All from the Channel menu.



### 4.1 Dock Tab

The tabs in the dock are designed to maximize the information that users can retrieve while minimizing the need to constantly shuffle windows around. Users can see the status of a chat session by looking at the following indicators on the right of the tabs:

-  Active Channel—The channel is the currently selected chat channel but has no new messages. The text of the channel name is black and the black dot symbol is visible.
-  Inactive Channel—The channel is currently open but has no new messages. The text of the channel name is gray.
-  Active Channel, New Message—The channel is the currently selected chat channel and has received new messages since a user last entered information. The text of the channel name is light blue and the active channel traffic symbol is visible.

-  Inactive Channel, New Message—The channel is not currently selected in the dock but has received a new message. The text of the channel name is light blue and the traffic symbol is visible.
-  Active Channel, Messages Waiting—The channel is currently selected and has had new messages since the last time the user entered a message. The text of the channel name is black and the active channel traffic symbol is visible.
-  Inactive Channel, Messages Waiting—The channel is not currently selected but has one or more messages waiting to be read. The text of the channel name is blue and the traffic symbol is visible.
-  Alert Arrived—An alert has arrived on the channel, signaling that immediate attention is required. The text of the channel name is red and the alert symbol is visible.

When users put the mouse over a tab, the last message in that channel is displayed in a small popup:






This way, users can see what was just said in a channel without having to change the currently visible channel.


## 4.2 Dock Tab Navigation

When the Dock window is resized to be smaller than the area needed to show all tabs, it displays two navigation buttons at the bottom of the tab area. These buttons are used like the buttons of a scroll area. Clicking the up arrow displays the tab above the current display area; likewise, clicking the down arrow displays the tab below. Holding down the mouse on either arrow allows rapid movement through the hidden tabs by shuffling the tabs in the direction of that arrow.



The buttons on the tabs behave as follows:

-  No Tabs—No tabs are hidden in the direction of the arrow.
-  Hidden Tab(s)—One or more tabs are hidden in the direct of the arrow.
-  New Message—A new message is waiting on one of the hidden tabs in the direction of the arrow.

-  Alert—An alert is waiting on one of the hidden tabs in the direction of the arrow.

When users put the mouse over a button, if there are new messages or alerts hidden, they will be notified how many there are by the following display:



This way, users can see how many messages or alerts they have without having to change the currently visible channel.

### 4.3 Dock Menu

The menus that are visible in the dock have behavior similar to standard chats as described earlier in Section 3. See Section 10 for more information about the menus.

### 4.4 Dock Toolbar

The toolbar buttons that are visible in the dock have behavior similar to standard chats as described earlier in Section 3. See Section 7 for more information about the toolbar buttons.

### 4.5 Dock Content Area

The Dock window content area behaves the same as other content areas in IC, as described earlier in Section 3.

### 4.6 Dock Splitter Area

The Dock window splitter behaves the same as other splitters in IC, as described earlier in Section 3.

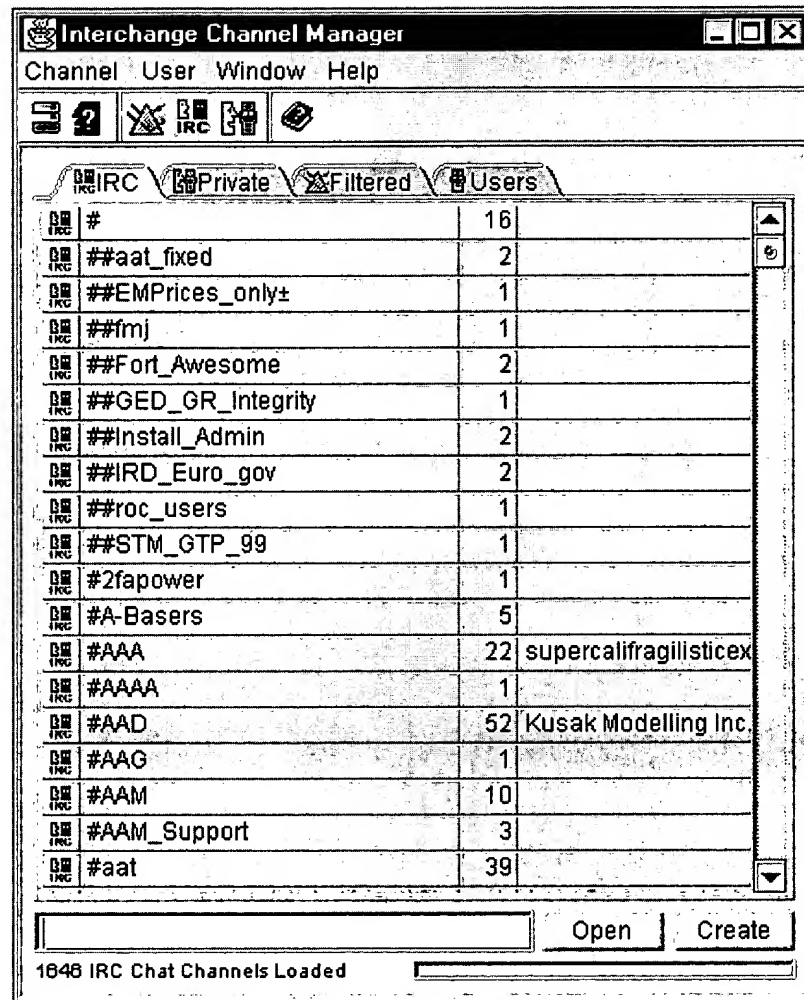
### 4.7 Dock Message Entry Area

The Dock window message entry behaves the same as other message entry areas in IC, as described earlier in Section 3.

## 5. Channel Manager

The Channel Manager window controls joining channels, opening conversations with users, seeing all the users that are on chat, seeing all the filter channels and private chats in process, and creating new channels. There are several ways to open the Channel Manager within IC:

- From any chat window, click the Channel Manager button on the toolbar.
- From any chat window, select the Show Channel Manager item on the Window menu.



### 5.1 Channel Manager Group Channel Tab

The Group Channel tab lists all of the group channels available on the chat network. To join one of the group chats, double-click on the channel name in the list, or type the name of the channel in the query area and click the Open button. To create a new group channel, type the name of the group channel in



the query area and click the Create button, or click the New Group Chat button in the toolbar.

## **5.2 Channel Manager Private Channel Tab**

The Private Channel tab lists all of the private channels that the users have opened. To open one of the private channels, double-click on the user name in the list or type the user name in the query area and click the Open button. To create a private channel, type the user name in the query area and click the Create button, or click the New Private Chat button in the toolbar.

## **5.3 Channel Manager Filtered Channel Tab**

The Filtered Channel tab lists all of the filtered channels that users have opened. To open one of the filtered channels, double-click on the filter name in the list or type the filter name in the query area and click the Open button. To create a filtered channel, type the filter name in the query area and click the Create button, or click on the New Filtered Chat button in the toolbar.

## **5.4 Channel Manager Users Tab**

The Users tab lists all of the users currently on chat. To open a private chat with someone in the list, double-click on the user name in the list, type the user name in the query area and click the Open button, or click the New Private Chat button in the toolbar. To open the User Inspector view, select a user and click the Whois button.

To invite a user to an invite-only channel, right-click on the desired user and choose the Invite menu item.

## **5.5 Channel Manager Channel Query Entry**

The Channel Query Entry text area is used for searching channels or users in the currently selected tab. To search, click in the area and start typing. The list will scroll to match the search term. The color of the text indicates the status of the search. Red indicates there is not a match. Blue indicates there is an exact match, and black indicates there is more than one match.

## **5.6 Channel Manager Menus**

The menus that are visible in the Channel Manager have behavior similar to standard chats as described earlier in Section 3. See Section 10 for more information about the menus.

## **5.7 Channel Manager Toolbar**

The toolbar buttons that are visible in the Channel Manager have behavior similar to standard chats as described earlier in Section 3. See Section 7 for more information about the toolbar buttons.

## 6. Channel Creation

---

The Channel Creation window is used to create a new filtered, group, or private channel. There are several ways to open the Channel Creation window:

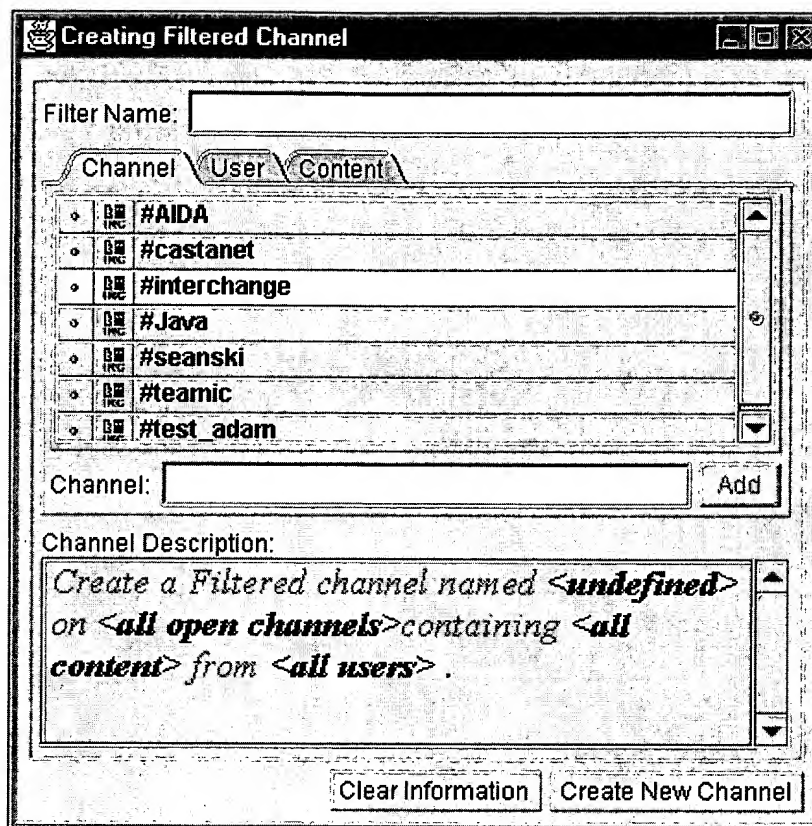
- From the toolbar of the Channel Manager, click on the New Private button, New Group button, or New Filtered button.
- From the Channel menu of the Channel Manager, select the New Channel menu item and then select the type of channel.
- From the Channel Manager, type the name of a new group channel, private channel, or filtered channel in the Channel Manager Query Entry. Then press the Enter key or click the Create button.

### 6.1 Creating a Filtered Channel

To create a filtered channel, open the Channel Manager window in the following ways:

- From the menu of any IC channel window, select the Show Channel Manager item from the Window menu.
- When an IC channel window has input focus, press Ctrl+M on the keyboard.

To create a new filter, select the filter icon or filter tab and type the name of the new filter in the text area on the lower left. Then, press the Enter key or click the Create button to open the Creating Filtered Channel window. If a name for the channel does not appear in the Filter Name field, type a unique name for the filter channel in the field.



The Creating Filtered Channel window is displayed.

Use this window to select the channels, users, and content criteria of the new filter channel. By default, the window displays all open channels, all users on all open channels, and all content from all users on all open channels.

Filter criteria for an existing channel can be edited in a similar window, the Editing Filter Channel window. To do this, bring the filter channel into focus and select Edit→Channel Properties. The Editing Filter Channel window is opened.

A text area at the bottom of the Creating Filtered Channel window and the Editing Filtered Channel window displays a summary of the current filter choices.

### 6.1.1 Select Channel Tab

Select channels for filter criteria from the Channel tab. Channel criteria can be added or removed in the following ways:

- Click the button to the left of the channel name.
- Double-click on the channel name.
- Right-click on the channel name.

With channels selected as filter criteria, the filter shows the content on the channels from all users by default.

### 6.1.2 Select User Tab

Select users for filter criteria from the User tab. User criteria can be added or removed in the following ways:

- Type the name of a user in the center text area and press the Enter key.
- Type the name of a user in the center text area and click the Add button.
- Click the button to the left of the user name.

The filter displays the content entered only by the selected users.

A user name may be an actual user name, or it may be a regular expression that evaluates to one or more user names. For example, you might enter `chenya\d*`, where `\d` means a digit and `*` means zero or more occurrence of a character, to match user names such as `chenya1` and `chenya2`.

### 6.1.3 Select Content Tab

Select content for filter criteria from the Content tab. Content criteria can be added in two ways:

- Type the text or regular expression in the center text area and press the Enter key.
- Type the text or regular expression in the center text area and click the Add button.

The filter displays only the sentences that match the text or regular expressions in the selections for the filter.

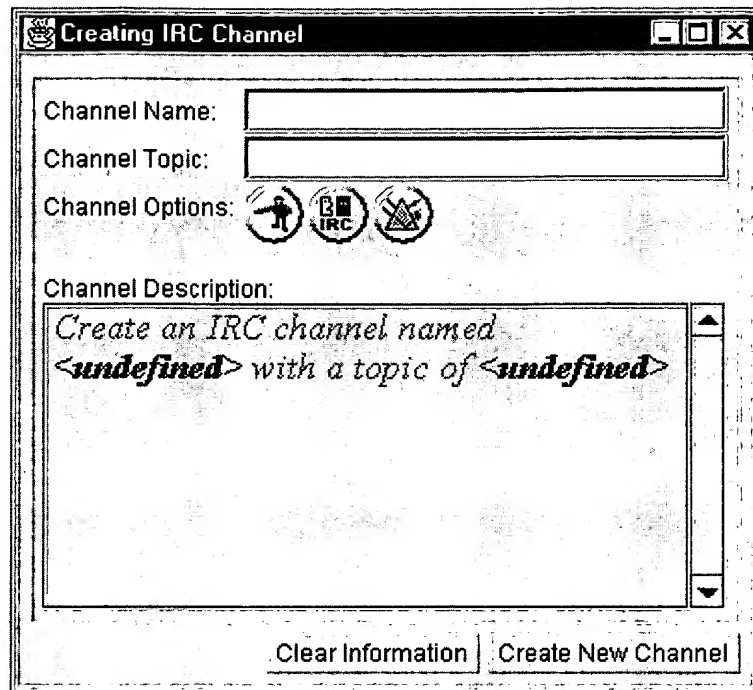
## 6.2 Creating a Group Channel

To create a group chat, open the Creating IRC Channel window. In the Channel Name field, enter the name of the channel. In the Channel Topic field, enter the topic message for the channel. This topic is displayed for the channel in the channel list.

A group chat can have several modes of operation. These are:

- Invite Only—Users may join the chat only when invited.
- Read-only—Users can read the chat but not contribute to it unless given permission to do so.

- Hidden—The chat is not visible in other users' channel managers.

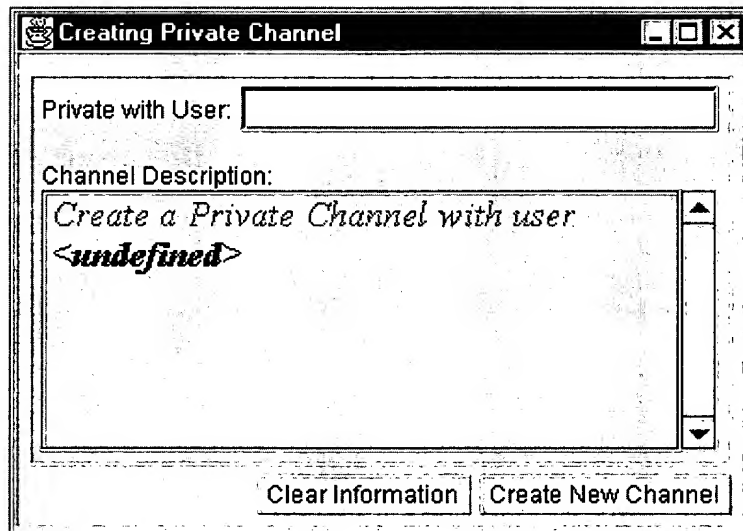


A screenshot of a dialog box titled "Creating IRC Channel". It contains the following fields and controls:

- Channel Name:** A text input field.
- Channel Topic:** A text input field.
- Channel Options:** Three circular icons: a person with a plus sign, a square with "IRC" inside, and a crossed-out speech bubble.
- Channel Description:** A text area containing the text: "Create an IRC channel named <undefined> with a topic of <undefined>".
- Buttons:** "Clear Information" and "Create New Channel" at the bottom right.

### 6.3 Creating a Private Channel

To create a private channel, open the Creating Private Channel window. Enter the user name in the Private with User field and click the Create New Channel button.



A screenshot of a dialog box titled "Creating Private Channel". It contains the following fields and controls:

- Private with User:** A text input field.
- Channel Description:** A text area containing the text: "Create a Private Channel with user <undefined>".
- Buttons:** "Clear Information" and "Create New Channel" at the bottom right.

## 6.4 Creating a Multi-Post Channel

A filtered channel allows the user to receive content from multiple channels. A multi-post channel allows the user to also send content to multiple channels. Multi-post channels are used to broadcast messages to multiple channels. This is similar to a regular filtered chat, in which the chats broadcast back to the channels on which they filter. Multi-post channels differ from regular filtered channels in that they send content but don't receive content.

The screenshot shows a window titled "Creating Filtered Channel". Inside, there is a "Filter Name:" field with the text "MultiPost1". Below this are three tabs: "Channel", "User", and "Content". The "Channel" tab is selected, showing a list with one item: "containing" followed by a minus sign. Below the list is a "Content:" field and an "Add" button. At the bottom, there is a "Channel Description:" field containing the text: "Create a Filtered channel named **MultiPost1** on channels: "#psw2" "#psw1" containing "!" from <all users> .". At the very bottom are two buttons: "Clear Information" and "Create New Channel".

## 7. Toolbar

The buttons in the toolbar of the IC windows have a unified look and feel.



### 7.1 Dock All Channels

The Dock All Channels button places in the Dock window all non-docked private, group, and filtered channel windows which users currently have open. This button is used to conveniently dock all windows at once instead of docking each one individually.

### 7.2 Show Channel Manager Window

The Show Channel Manager Window button opens the Channel Manager window and brings it to the front. The Channel Manager window is used to open channels, create new channels, and display a list of the channels and users on the network.

### 7.3 Whois

The Whois button performs two functions:

- Selecting a user from the user list and clicking this button displays a User Inspector window with the user login ID, the user's real name, and a list of channels that the user is currently on.
- When there is no user selected, clicking this button displays the User Inspector window containing a text field without a user name. The user enters a user login ID in the text field. The information for that user is displayed.

### 7.4 Channel Preferences

The Channel Preference button opens the Preferences window. The Preferences window is used to set the colors, fonts, sounds, and window behaviors. When the user click the Channel Preference button from a Group Chat window, such as #Interchange, it brings up the preferences for that channel only. Settings made in that Preferences window will only affect #Interchange.

To make changes to all displays in IC, open the Preferences window from the Preference item on the Channel menu.



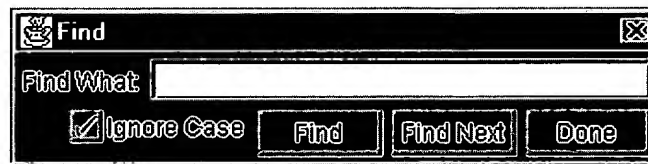
See Section 8 for more information about the Preferences window.

## 7.5 Print

The Print button can be selected from a chat window to display a print dialog. From this dialog, the user selects and sets up the printer options. Clicking the OK button prints the contents of the chat window.

## 7.6 Find

The Find button can be selected from a chat window to display a find dialog to search the contents of the window.



Enter the search criteria (text or regular expression) in the Find What field. To ignore case in the search, make sure the Ignore Case checkbox is checked. Then click the Find button. To get the next match for the search, click the Find Next button. When finished, click the Done button.

## 7.7 Post File

The Post File button can be selected from a chat window to display a file open dialog. Find the file to be posted and click the Open button to post the file to a web server. A document icon with an image will be available for selection by users running IC. Users not running IC can copy and paste the URL into their web browsers.

## 7.8 Help

The Help button displays help for the currently active window in a web browser. Help can also be displayed by selecting the Help menu.

## 7.9 Show/Hide User List

The Show/Hide User List button can be selected from a chat window to show or hide the display of the user list.

## 7.10 Dock/Undock Window

The Dock/Undock button can be selected from a chat window to place it in the Dock window and create a tab with the window name as title. Clicking the Dock/Undock button in the Dock window undocks the currently selected tab and places it in its own window.

### 7.11 Private Chat/New Private

The Private Chat/New Private button has several behaviors, depending on where it is selected.

- From the Channel Manager window, clicking this button opens a Channel Creation window. In the Channel Creation window, the user enters the name of the user with whom to open the private channel.
- From a chat window, the button has two behaviors:
  - If the user list is shown, clicking the button opens a private channel with the currently selected user.
  - If the user list is hidden, the Channel Creation window will be opened and the user enters the name of the user with whom to open the private channel.
- From the User Inspector window, this button opens a private channel with the user currently being inspected.

### 7.12 New Group Chat

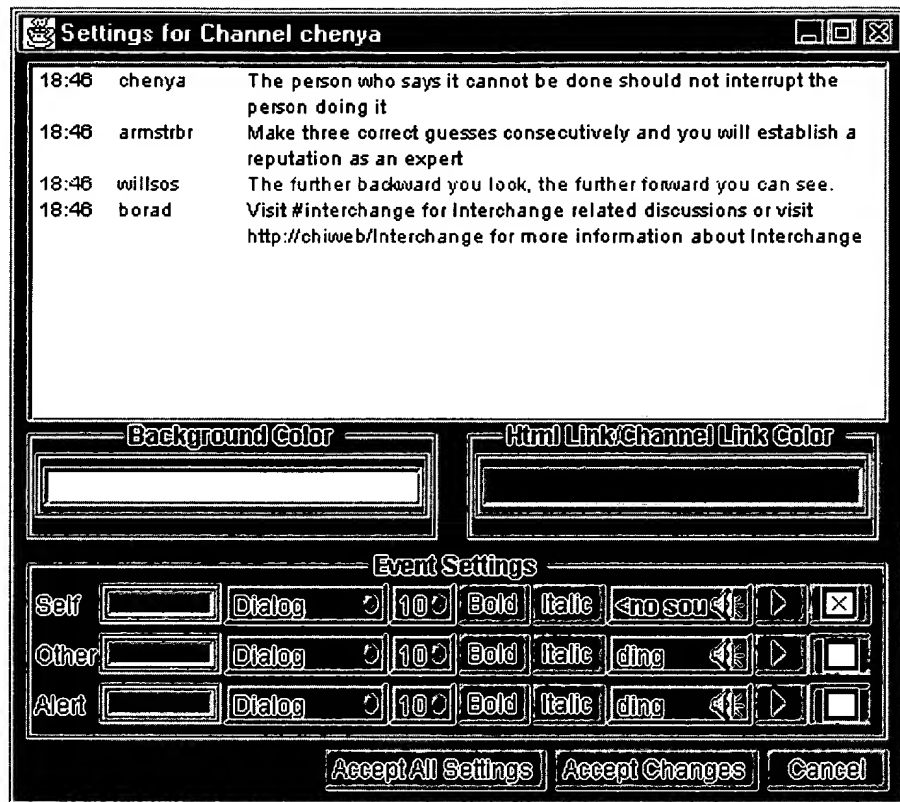
The New Group Chat button can be selected from the Channel Manager window to open a Channel Creation window. In the Channel Creation window, the user can enter a channel name, channel topic, and the mode of the channel.

### 7.13 New Filtered Chat

The New Filtered Chat button can be selected from the Channel Manager window to open a Channel Creation window. The user then selects filter criteria and creates a filtered channel.

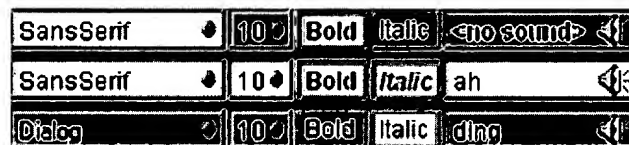
## 8. Preference

The Preferences window is the control center for the display of information in the chat windows. It describes how to display information in terms of color, font, and sound for different types of messages.



The behavior of the Preferences window differs depending on the manner in which it was opened. To make changes to all displays in IC, open the Preferences window from the Preference item on the Edit menu. To make changes only to the current chat window, open the Preferences window through the Preferences button in the toolbar.

When an item in the Preferences window is modified, the item turns white:



Then, to apply the changes, click one of the following buttons:

- **Accept All Settings** Saves all of the settings in the window, including the ones that did not change.

- **Accept Changes** Saves only the items that have been changes (displayed in white).
- **Cancel** Cancel the current editing and close the window.

The event settings are divided into three rows.

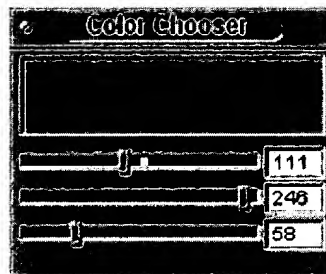
- **Self**—When the user sends a message, this row of controls determines how that message is displayed.
- **Other**—When someone other than the user sends a message, this row of controls determines how that message is displayed.
- **Alert**—When an Alert message is received, this row of controls determines how that message is displayed.

## 8.1 Colors

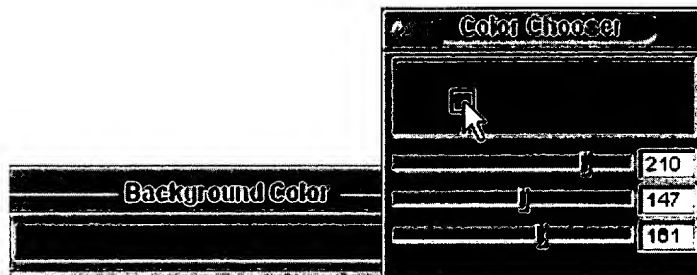
The Colors area is used to configure the colors of text, background, and links.



Click in the color display and a small color chooser opens.



To modify the color, move the red, green, and blue sliders. To move the resulting color into the color wall, place the mouse over the center of the color chooser and drag the color out of the chooser into the color wall.



## 8.2 Fonts

The font drop-down lists and buttons are used to configure the font style, size, and format for messages.





8.3 Sounds

The sound drop-down list is used to configure the sound that is played when a message is displayed. To preview a sound, select it in the list and click the Play button.



8.4 Window Default Behavior

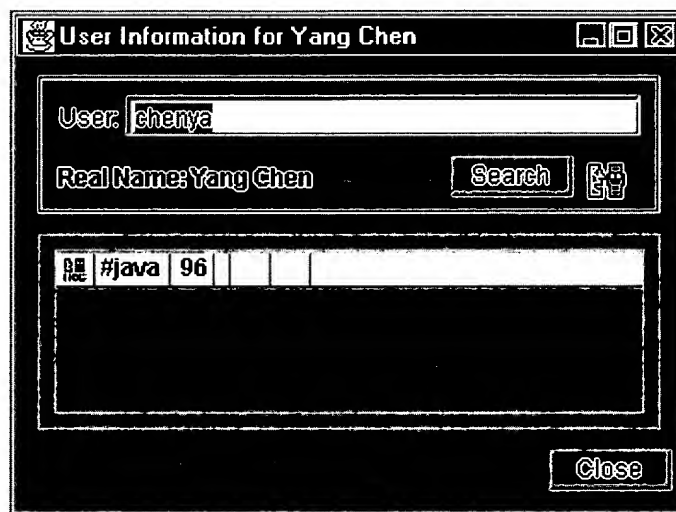
The Window Default Behavior button is used to configure the behavior of a window when a message is received.

-  Float—When a new message is received, the window pops out or floats.
-  Do Nothing—When a new message is received, the window does nothing.

## 9. User Inspector

The User Inspector allows users to find information about other users on the chat network or a group chat channel. There are several ways to bring up the user inspector window:

- From the Dock window, click the Whois button on the toolbar.
- From the Channel Manager window, select a user in the Users tab and click the Whois button on the toolbar.
- From any chat window, when no user is selected on the user list, click the Whois button on the toolbar.



### 9.1 User Inspector New Entry

In the User field, enter the user name, then press the Enter key on the keyboard or click the Search button. If the window is opened by selecting a user in the user list, the user name automatically appears in this field and the search is automatically started.

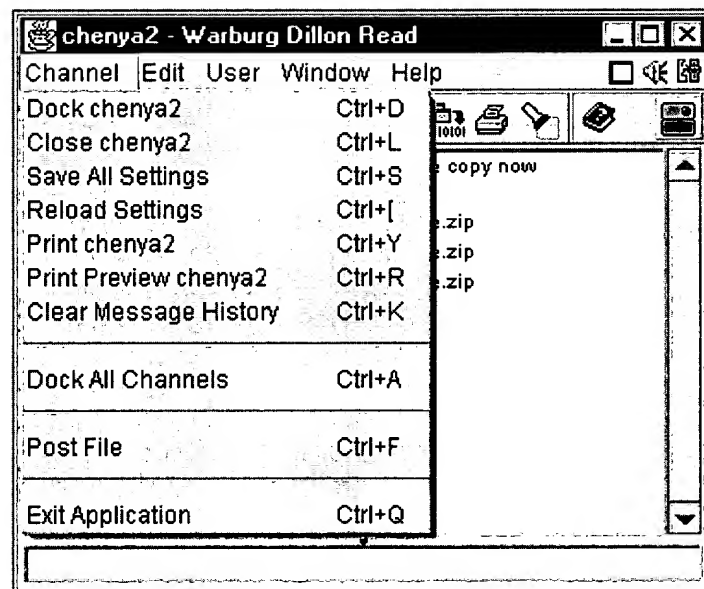
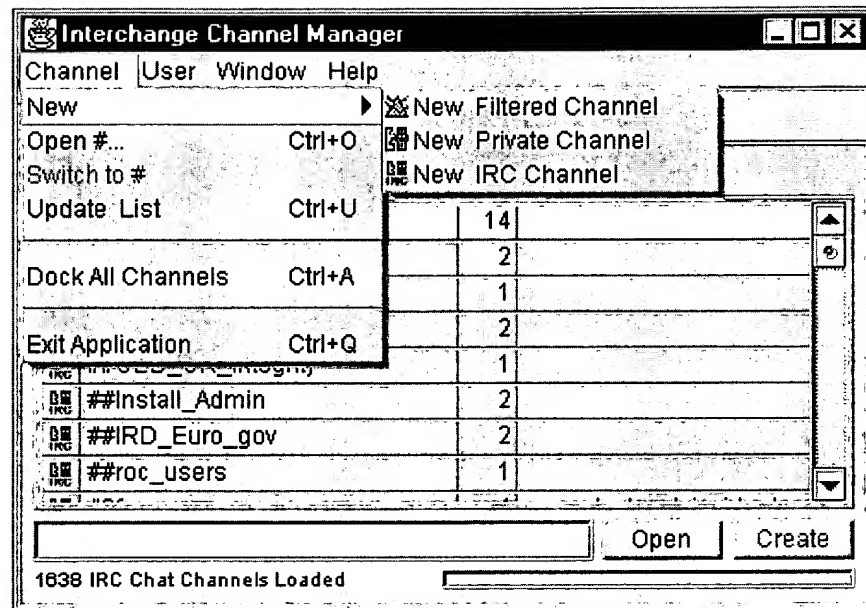
### 9.2 User Inspector Results

The list of channels selected by the user are displayed in the bottom half of the window. This list is similar to that shown in a Channel Manager tab.

## 10. Menu

The menus in the IC windows have a unified look and feel.

### 10.1 Channel Menu



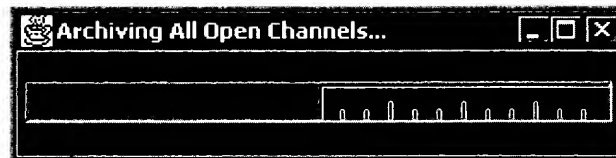
The Channel menu contains the following menu items:

- Dock/Undock—From any chat window, choosing this menu item places the chat window in the Dock window and creates a tab with the window



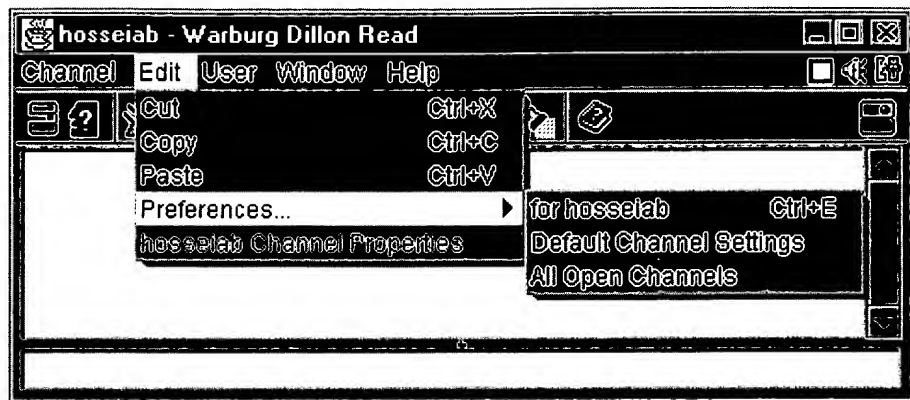
name as title. Selecting this menu item while in the Dock window undocks the currently selected tab and places it in its own window.

- **Close/Open**—From any chat window, choosing this menu item closes the chat window. The user must join the channel again to receive further communications. From the channel manager, choosing the menu item closes the currently selected channel if it has been joined. Otherwise, it opens the currently selected channel.
- **Save All Settings**—Choosing this menu item saves the position and current state of all open windows. When the user starts IC the next time, the application restarts with all windows in this saved state. A status bar depicts how much of the save has completed.



- **Reload Settings**—Choosing this menu item reloads all open windows in their last saved position and state.
- **Print**—From any chat window, choosing this menu item opens a print dialog to select and set up the printer options. Clicking the OK button prints the contents of the chat window.
- **Print Preview**—From any chat window, choosing this menu item displays a representation of what will be printed.
- **Clear Message History**—From any chat window, choosing this menu item clears the communications in the content area of the window.
- **Dock All Channels**—Choosing this menu item places all non-docked private, group, and filtered channel windows that are currently open into the Dock window.
- **Post File**—From any chat window, choosing this menu item displays a file open dialog. Find the file to be posted and click the Open button to post the file to a web server.
- **Exit Application**—Choosing this menu item shuts down IC. IC saves the state of all currently open windows, so that the next time users start IC, the application will start up in the same state as it was left in the previous session. A status bar depicts how much of the save has completed. When the save is complete, the window closes and IC completely shuts down.
- **Switch to *channel-name***—From the Channel Manager, choosing this menu item brings forward the specified channel if it is a single window. If the channel is in the dock, the channel's tab is selected and the Dock window gains focus.
- **Update List**—From the channel manager, choosing this menu item updates the user list or channel list. This menu item should be used only when a channel has been created but cannot be seen in the list.

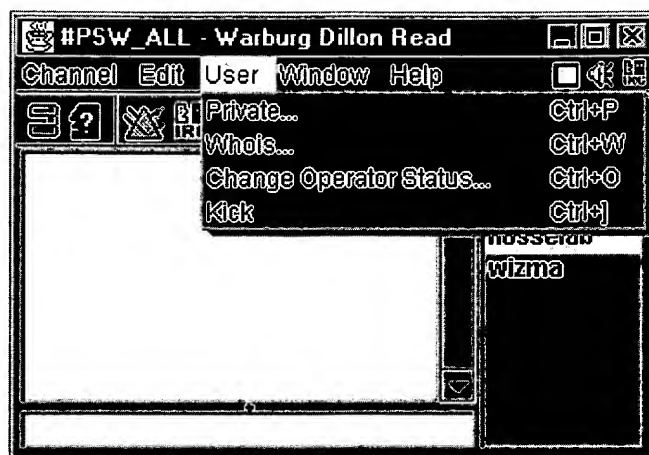
## 10.2 Edit Menu



The Edit menu contains the following menu items:

- **Cut**—From any chat window, choosing this menu item cuts the currently selected area into the Windows clipboard for later pasting.
- **Copy**—From any chat window, choosing this menu item copies the currently selected area into the Windows clipboard for later pasting.
- **Paste**—From any chat window, choosing this menu item places the content of the Windows clipboard into the currently focused text field.
- **Preferences**—This menu item contains several submenus for setting up colors, fonts, sounds, and window behaviors. The submenus are:
  - *for channel-name*—Affects the preferences for only one channel.
  - **Default Channel Settings**—Affects the settings for all new channels.
  - **All Open Channels**—Affects all channels that the user has opened.
- **Channel Properties**—From any chat window, choosing this menu item opens the Channel Creation window in edit mode to allow the user to change the attributes of that channel.

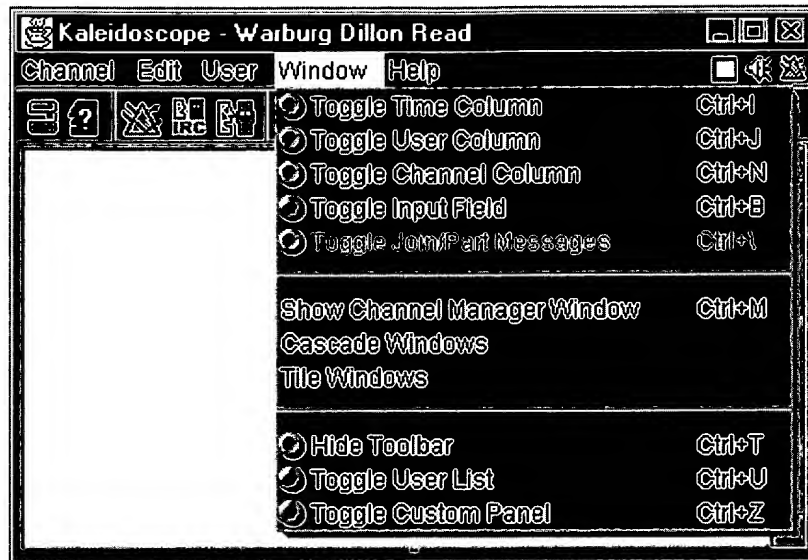
### 10.3 User Menu



The User menu contains the following items:

- Private—From the Channel Manager window, choosing this menu item opens the Channel Creation window for entering a user name with whom to have a private chat.
- Whois—The Whois menu item performs two functions depending on when it is selected.
  - A user in a Group Chat window selects a user from the user list. Choosing this menu item displays a User Inspector window with the user login ID, the user's real name, and a list of channels that the user is currently on.
  - From the Channel Manager window or the Group Chat window, choosing this menu item displays the User Inspector window. This time, the User Inspector window contains a text field without user name. The user enters a user login ID in the text field. The information for that user is displayed.
- Change Operator Status—This option is available only for users with operator status. From a Group window, choosing this menu item changes the operator status of the currently selected user in the user list. Users that do not currently have operator status are given it, and users that do currently have operator status have it revoked. Having operator status allows a user to change the topic and the mode of a channel.
- Kick—From a Group window, selecting this menu item removes the selected user from the group.

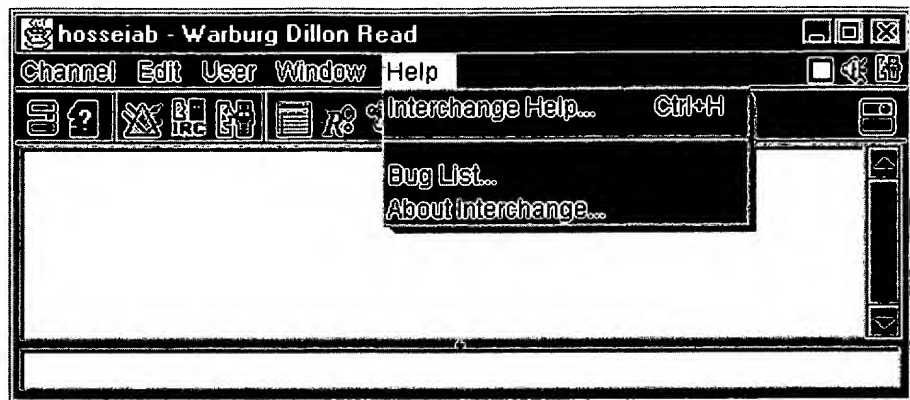
### 10.4 Window Menu



The Window menu contains the following items:

- **Toggle Time Column**—From any chat window, choosing this menu item shows or hides the time column in the content area.
- **Toggle User Column**— From any chat window, choosing this menu item shows or hides the user column in the content area.
- **Toggle Channel Column**— From any chat window, choosing this menu item shows or hides the channel column in the content area.
- **Toggle Input Field**— From any chat window, choosing this menu item shows or hides the channel input area.
- **Toggle Join/Part Messages**— From any chat window, choosing this menu item monitors users as they join and leave channels.
- **Show Channel Manager Window**— From any chat window, choosing this menu item opens the Channel Manager window and brings it to the front.
- **Cascade Windows**— From any IC window, choosing this menu item causes the currently displayed windows to cascade themselves from the upper left of the monitor down to the right.
- **Tile Windows**— From any IC window, choosing this menu item causes the currently displayed windows to tile themselves in the order they are opened.
- **Show/Hide Toolbar**— From any chat window, choosing this menu item shows or hides the display of the toolbar.
- **Toggle User List**— From any IC window, choosing this menu item shows or hides the display of the user list.
- **Toggle Custom Panel**—From the filter channel named Kaleidoscope, choosing this menu item shows or hides the structured input panel for creating orders or submitting comments.
















## 10.5 Help Menu



The Help menu contains the following menu items:

- **Interchange Help**— From any IC window, choosing this menu item starts the web browser and displays the page with help on the currently active window.
- **Bug List**— From any IC window, choosing this menu item starts the web browser and displays the page with the currently known IC bugs. This page is also used to submit bug information.
- **About Interchange**— From any IC window, choosing this menu item displays the About panel with information about the IC team. This panel contains the information needed by technical support, including the version and release date.

## 11. Appendix A—Interchange Quick Reference

Quick Reference Card		Chatting on Interchange	
<b>Using Window Controls</b>			
<b>Toggle the Window Controls icon to set a window's reaction to received messages.</b> <ul style="list-style-type: none"> <li> Window floats on all new messages</li> <li> Window will not float on any message</li> <li> Window will float on Alerts only</li> </ul>		<b>Toggle the Sound Control icon to determine when windows play sounds.</b> <ul style="list-style-type: none"> <li> Play sounds on all new messages</li> <li> Don't play sounds at all</li> <li> Play sounds on Alerts only</li> </ul>	
<b>Using the Dock</b>			
<b>Docking and Undocking Channels</b> <ul style="list-style-type: none"> <li> To Dock/Undock a chat window:           <ul style="list-style-type: none"> <li>Click on its Dock/Undock icon; or</li> <li>Go to the Channel menu. Select <b>Dock</b> [channel name] or hit Ctrl + D.</li> </ul> </li> <li> To dock all of your open windows at once:           <ul style="list-style-type: none"> <li>Click the Dock All icon; or</li> <li>Hit Ctrl + A; or</li> <li>Go to the Channel menu. Select <b>Dock all Channels</b>.</li> </ul> </li> </ul>		<b>Docked Channels Status Icons</b> <ul style="list-style-type: none"> <li> Active/visible channel</li> <li> A new message is waiting</li> <li> An Alert has arrived</li> <li> Active channel has new messages</li> </ul>	
<b>Creating a Filtered Chat</b>			
<b>Creating a Filtered Chat</b> <ul style="list-style-type: none"> <li> In the Channel Manager:           <ul style="list-style-type: none"> <li>Click on the New Filtered icon; or</li> <li>From the Channel Menu select <b>New</b>, and then <b>New Filtered Channel</b>.</li> <li>In the <b>Creating Filtered Channel</b> window, enter the filter criteria. Hit the <b>Create New Channel</b> button.</li> </ul> </li> </ul>		<b>Multi-Posting a Message</b> <ol style="list-style-type: none"> <li>Establish a Filtered channel.</li> <li>In the <b>Creating Filtered Channel</b> window, enter the channels and/or individual users who should receive the message.</li> <li>Send the message from the Filtered channel.</li> </ol> <p>The message will go to all of the channels and users shown in the criteria list for that channel.</p>	
<b>Creating Other Types of Channels</b>			
<b>Creating a New IRC (Group)</b> <ul style="list-style-type: none"> <li> In the Channel Manager:           <ul style="list-style-type: none"> <li>Click on the New IRC icon; or</li> <li>Click the IRC tab. Enter the new name in the text box. Click the Create button or hit Enter; or</li> <li>From the Channel menu select <b>New</b>, and then <b>New IRC Channel</b>. Complete <b>Creating IRC Channel</b> window. Hit <b>Create</b>.</li> </ul> </li> </ul>		<b>Creating a Private</b> <ul style="list-style-type: none"> <li> In the Dock or any channel's User List:           <ul style="list-style-type: none"> <li>Double-click on the individual's name; or</li> <li>Select the name. Click the <b>Private Chat</b> icon.</li> </ul> </li> <li>In the Channel Manager:           <ul style="list-style-type: none"> <li>Click the <b>New Private</b> icon to access the <b>Creating Private Channel</b> window; or</li> <li>Click on the <b>Users</b> tab. Scroll to select a name. Click <b>Open</b>.</li> </ul> </li> </ul>	

©Warburg Dillon Read, 1998

Interchange Help: <http://chiweb.chi.swissbank.com/Interchange>

©Warburg Dillon Read, 1998

Interchange Help: <http://chiweb.chi.swissbank.com/Interchange>

For Internal Use Only

For Internal Use Only

## Appendix B—Update History

Lists the update history for this document.

Version	Release Date	Description
2.3.2	3/23/99	Created
2.3.2	3/25/99	Edited by tech writing
2.4	4/20/99	Updated for IC 2.4
2.4	4/21/99	Edited by tech writing
2.4	4/26/99	Final production

# **INFORMATION DISCLOSURE STATEMENT BY APPLICANT** ( Not for submission under 37 CFR 1.99)

Application Number

Filing Date

First Named Inventor

Art Unit

Examiner Name

Attorney Docket Number

## **U.S.PATENTS**

Examiner Initial*	Cite No	Patent Number	Kind Code <sup>1</sup>	Issue Date	Name of Patentee or Applicant of cited Document	Pages, Columns, Lines where Relevant Passages or Relevant Figures Appear
	1					

If you wish to add additional U.S. Patent citation information please click the Add button.

## **U.S.PATENT APPLICATION PUBLICATIONS**

Examiner Initial*	Cite No	Publication Number	Kind Code <sup>1</sup>	Publication Date	Name of Patentee or Applicant of cited Document	Pages, Columns, Lines where Relevant Passages or Relevant Figures Appear
	1					

If you wish to add additional U.S. Published Application citation information please click the Add button.

## **FOREIGN PATENT DOCUMENTS**

Examiner Initial*	Cite No	Foreign Document Number <sup>3</sup>	Country Code <sup>2</sup> j	Kind Code <sup>4</sup>	Publication Date	Name of Patentee or Applicant of cited Document	Pages, Columns, Lines where Relevant Passages or Relevant Figures Appear	T <sup>5</sup>
	1							<input type="checkbox"/>

If you wish to add additional Foreign Patent Document citation information please click the Add button

## **NON-PATENT LITERATURE DOCUMENTS**

Examiner Initials*	Cite No	Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc), date, pages(s), volume-issue number(s), publisher, city and/or country where published.	T <sup>5</sup>



**This Page is Inserted by IFW Indexing and Scanning  
Operations and is not part of the Official Record**

**BEST AVAILABLE IMAGES**

Defective images within this document are accurate representations of the original documents submitted by the applicant.

Defects in the images include but are not limited to the items checked:

- ☐ **BLACK BORDERS**
- ☐ **IMAGE CUT OFF AT TOP, BOTTOM OR SIDES**
- ☐ **FADED TEXT OR DRAWING**
- ☐ **BLURRED OR ILLEGIBLE TEXT OR DRAWING**
- ☐ **SKEWED/SLANTED IMAGES**
- ☐ **COLOR OR BLACK AND WHITE PHOTOGRAPHS**
- ☐ **GRAY SCALE DOCUMENTS**
- ☐ **LINES OR MARKS ON ORIGINAL DOCUMENT**
- ☐ **REFERENCE(S) OR EXHIBIT(S) SUBMITTED ARE POOR QUALITY**
- ☐ **OTHER:** \_\_\_\_\_

**IMAGES ARE BEST AVAILABLE COPY.**

**As rescanning these documents will not correct the image problems checked, please do not report these problems to the IFW Image Problem Mailbox.**